AGENDA ITEM: LoC Loan Compensation Program

GENERAL OVERALL PROGRAM UPDATES:

Handling/Delivery Cost Study:

Staff issued a Request For Proposal (RFP) to determine the handling and delivery costs of interlibrary loans and the handling costs of direct loans among member institutions of the Library of California. In October 2002, the project was awarded to Florence Mason and Associates from Texas. The four phases to the project are:

Phase I: Design the cost study to determine handling and delivery costs of interlibrary loan and handling costs of direct loan

Deliverable Products: Bibliography and archive
Outline of final report
Questions to be addressed in collecting data
Data collection methodology

Phase II: Implement the cost study and report findings

Deliverable Products: Draft report of cost study results
Final report of cost study results

Phase III: Develop loan compensation policy recommendations

Deliverable Products: First draft report of policy options
Second draft report of policy options
Final report of policy options
Presentation to the Library of California Board

Phase IV: Calculation of compensation formula

Deliverable Product: Formula for reimbursement for handling and delivery costs of interlibrary loan and handling costs of direct loan, to be used in subsequent rulemaking.

Work is now beginning on Phase I activities. At the end of each phase, a review will occur to determine if the work of that phase has been satisfactorily completed and that continuation of the project will occur with the same consultant team. The project also calls for the development of an advisory committee to work with staff and the consultant team to insure the integrity of the process and the accuracy and validity of the outcomes.

RELATED ISSUE TO COME BEFORE THE BOARD IN THE FUTURE: What funding formulas are appropriate for the loan components of Library of California access services?

Relevant Committee: Access Services
Staff Liaison: Sandy Habbestad

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